Learning Wheel – creating common frameworks for joint learning, action and knowledge management

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LearningWheel© – Creating common frameworks for joint learning, action and knowledge management

'Lesson learning' has become a common practice to capture experiences in implementing projects and programmes. However, the lessons often end up not being used outside the interventions from which they emerged. In response to that gap, the LearningWheel methodology has been developed and tested in numerous cases over the last four years. It suggests a way to organise experiences and lessons in conceptual and operational frameworks which enable a wide-spread use of the conceptualised knowledge. The development of LearningWheels is a rapid way to tap and build on the knowledge and experience base of multi-stakeholder groups in workshops and create a common understanding of complex process-oriented development interventions.

Developing LearningWheels: From Practice to Concept

The LearningWheel methodology generates experience-based conceptual frameworks from practice, building on the lessons and success factors of practical case examples in an analytical and appreciative manner. In several analytical steps, workshop participants distil the success factors which were central to generate successes in different cases and experiences. Failure factors are equally considered. These are clustered into 'cornerstones' and systematised into a LearningWheel framework.

There are numerous initiatives where this methodology has been applied and guides have been written. Some examples of the application of the methodology in natural resource management include:

- The INRM initiative of CGIAR: http://www.icarda.cgiar.org/INRM/INRM4_Site/INRM_All%20_2002.pdf),
- Guide to strategic planning in CGIAR: (http://www.worldfishcenter.org/Pubs/corporate/muddy_waters/muddywaters.htm),
- Guide to reform of rural/agricultural services: (http://www.gtz.de/agriservice/resources/topics/snrd_june2000.pdf).

The **'cornerstones'** of the LearningWheel frame are fundamentals of successful interventions which are in systemic interaction with the other fundamentals. Based on 'systemic intervention', each of the cornerstones need to be addressed as otherwise the weakest one becomes a threat to the whole approach. This does not mean that they all have to be actively addressed at the same time; some of them might be in place anyway, others which are identified as gaps can be addressed through linkages and partnerships. In this sense, the LearningWheel serves as a checklist which can also be used for self-reflection and evaluation of initiatives and for the design of new initiatives.

Each cornerstone is processed further in terms of its **'elements'**, **'key strategies & processes'**, and **'possible ways to implement'** within these strategies. These components are also distilled from different participants' experiences, which are often limited to some cornerstones, but the totality of participants enables the development of a table as a comprehensive frame. Possible links to available experiences and websites describing them help to make the whole framework an open-ended 'learning frame' for knowledge management in multi-stakeholder initiatives.

The participatory process of developing the LearningWheel is logically structured in an analytical manner. Often, individual cases have only lessons, success factors and promising strategies in some areas, but when analysing a variety of different experiences or cases together, a comprehensive framework can be developed.

Application of the LearningWheel: from concept back to practice

The utility of the conceptualised experiences is in its application to enhance better practice and learning. Some of the options where the LearningWheel framework have been successfully applied in practice are:

- **As a frame to design new programmes.** In setting up new programmes, the context can be analysed along the cornerstones together with the main stakeholders and the main areas of interventions of the projects can be defined on the basis of the joint analysis (e.g.: what exactly do we mean by this cornerstone, why is it important? is that cornerstone really in place?, how do we know?, if not, is it a hindrance now?, what do we need to do to avoid it becoming a barrier or to overcome the gap?).
- **As a frame to monitor and evaluate on-going programmes in a strategic way.** Implementation teams can use the frame to reflect on their intervention and analyse the state of the art for each cornerstone in regular self-reflection sessions. This helps them to reach a common perspective on where they are now, what they consider success and what the knowledge and design gaps are in their existing intervention.
- **As a knowledge management tool.** The lessons, experiences, methodologies and tools used to enhance each of these cornerstones can be collected,
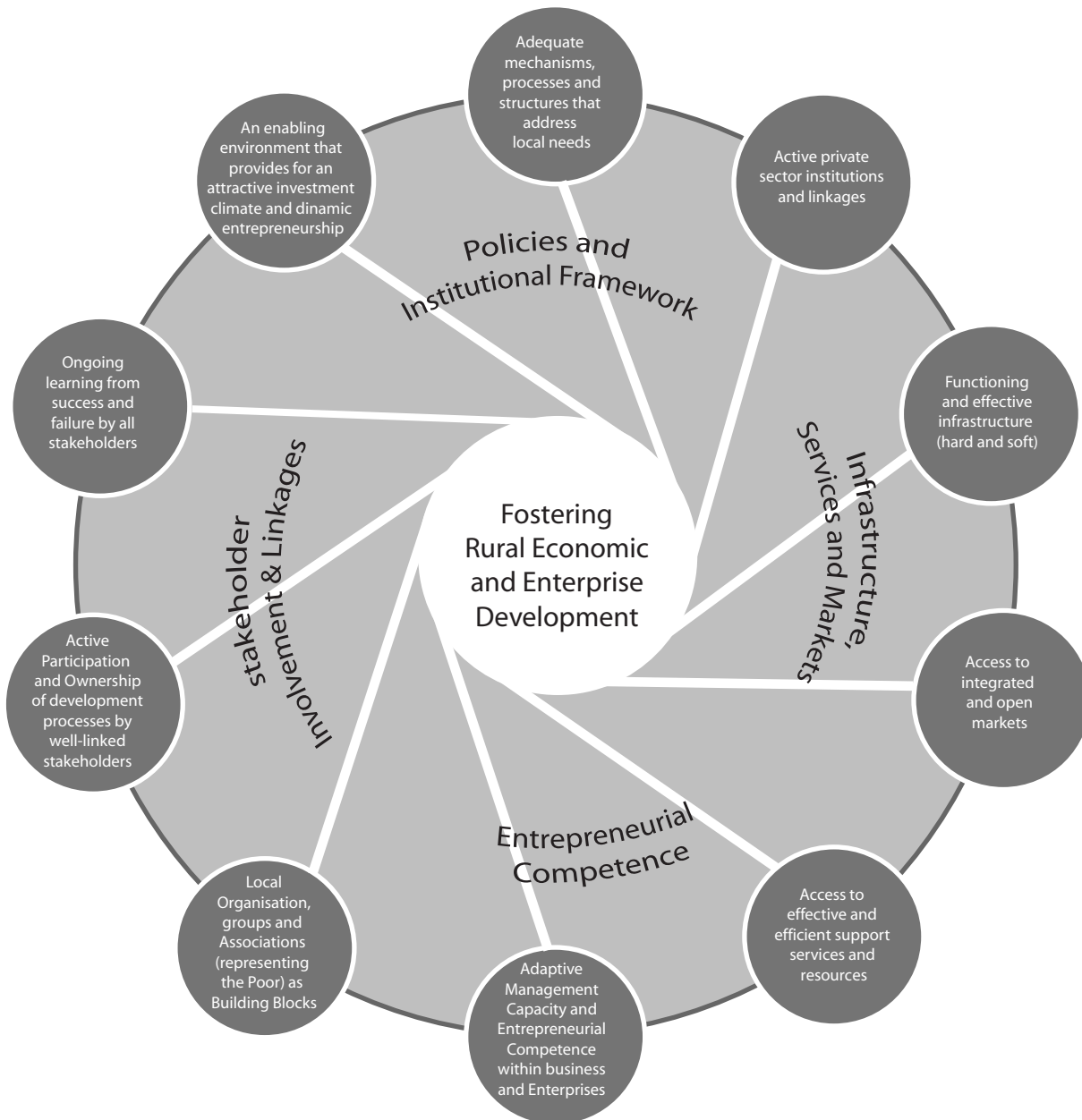
synthesised across programmes and put back into the framework (the tables) and developed a into a multi-stakeholder knowledge management system (e.g through interactive websites). It fosters an analysis of lessons and methodological knowledge within programmes and across agencies.
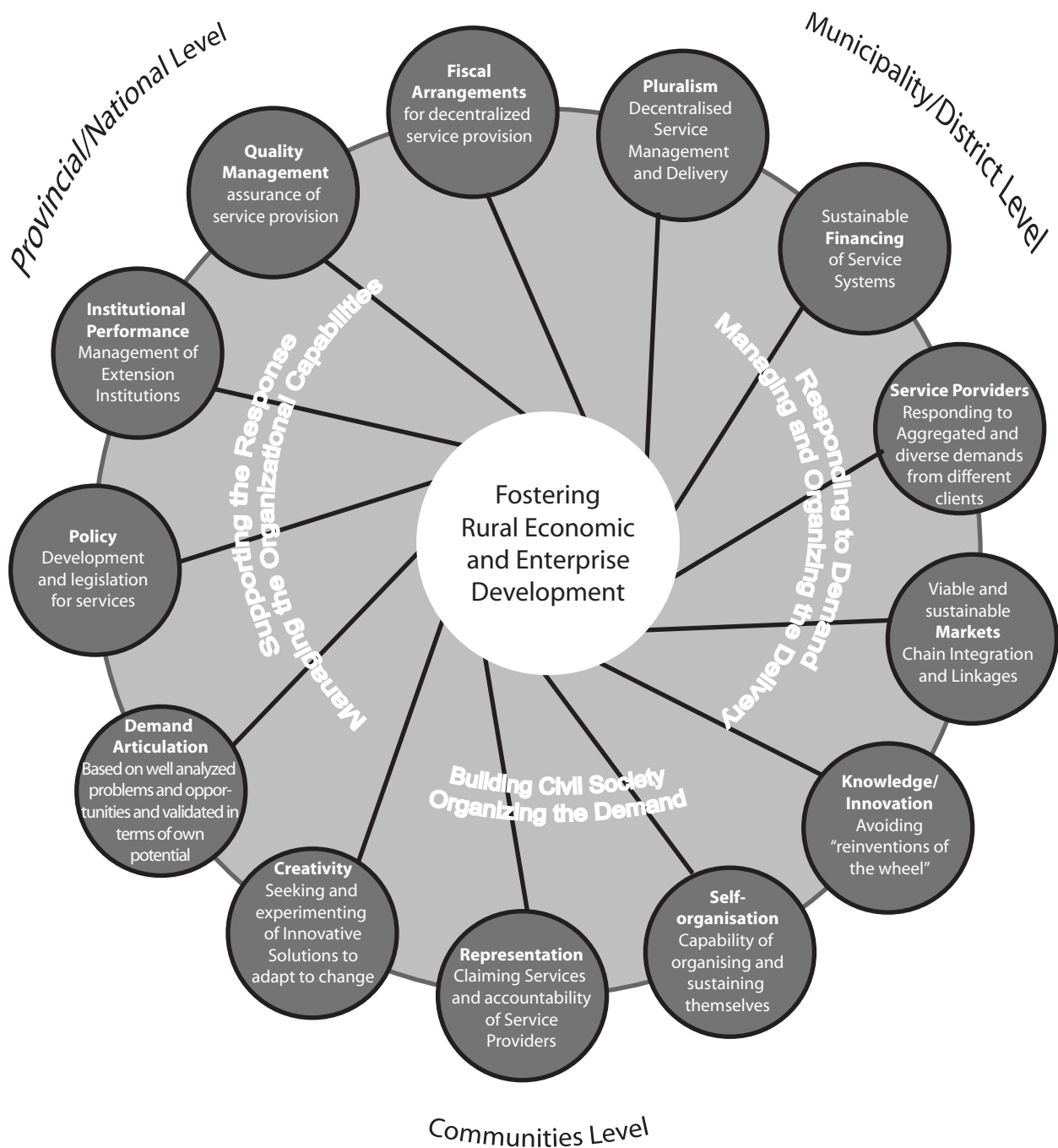
• **As a tool to create a common understanding and vision** of the way to implement certain types of interventions among a diverse range of stakeholders and partners involved in the implementation teams. A particular benefit is the creation of a common understanding of an implementation process as a result of the joint analysis on the basis of the cornerstones in the different contexts described above. It helps to learn together and to recognise the complexity and get a grasp of how to handle it.

Ultimately it does not matter at what stage of a programme or initiative the analysis based on the LearningWheel is carried out. Interventions or initiatives are considered as on-going learning processes among stakeholders who continuously try to improve their effectiveness. Regular reflections with the partners on the basis of the framework help to strengthen a dynamic problem and opportunity analysis. The flexible frame is a simple tool to help operationalisation of process and systemic intervention together with multiple stakeholders.

Further Information

For more information about this methodology, contact Dr. Jürgen Hagmann, Organisational Development Consultant and Facilitator for Innovation / Change processes **JHagmann@aol.com**

Fostering Rural Economic and Enterprise Development

Policies and Institutional Framework
- Adequate mechanisms, processes and structures that address local needs
- Active private sector institutions and linkages
- An enabling environment that provides for an attractive investment climate and dinamic entrepreneurship

Infrastructure, Services and Markets
- Functioning and effective infrastructure (hard and soft)
- Access to integrated and open markets

Entrepreneurial Competence
- Access to effective and efficient support services and resources
- Adaptive Management Capacity and Entrepreneurial Competence within business and Enterprises

stakeholder Involvement & Linkages
- Ongoing learning from success and failure by all stakeholders
- Active Participation and Ownership of development processes by well-linked stakeholders
- Local Organisation, groups and Associations (representing the Poor) as Building Blocks

Provincial/National Level

Municipality/District Level

Fostering
Rural Economic
and Enterprise
Development

Fiscal Arrangements for decentralized service provision

Pluralism Decentralised Service Management and Delivery

Quality Management assurance of service provision

Sustainable **Financing** of Service Systems

Institutional Performance Management of Extension Institutions

Service Porviders Responding to Aggregated and diverse demands from different clients

Policy Development and legislation for services

Viable and sustainable **Markets** Chain Integration and Linkages

Demand Articulation Based on well analyzed problems and opportunities and validated in terms of own potential

Knowledge/ Innovation Avoiding "reinventions of the wheel"

Creativity Seeking and experimenting of Innovative Solutions to adapt to change

Self- organisation Capability of organising and sustaining themselves

Representation Claiming Services and accountability of Service Providers

Supporting the Response
Building the Organizational Capabilities

Responding to Demand
Managing and Organizing the Delivery

Managing

Building Civil Society
Organizing the Demand

Communities Level

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The LearningSystem© – an alternative way of managing complex and dynamic development processes

The LearningSystem is an outcome-based planning and management system for innovation processes. It was experientially developed in a number of initiatives over the past four years, as a response to a lack of tools and methods to manage process-type interventions with an adequate quality and stakeholder involvement without being boxed and stifled by rigid linear thinking in logframes. Often 'process' and 'participation' have been used more as an excuse for weak planning and implementation and non-accountability for weak results, rather than meaning a true commitment to engage stakeholders in quality learning processes which enhance performance and outcomes. LearningSystem attempts to address these flaws through

- creating a strong vision/outcome/impact orientation (rather than results and activities) which serves as a reference frame for learning, reflecting and 'navigating' by implementing teams and stakeholders on their effectiveness;
- integrating planning and conceptual/approach development together with stakeholders into a coherent 'joint learning' approach towards impact and effectiveness;
- generating flexible conceptual frameworks (LearningWheels) with stakeholders for steering and monitoring of initiatives rather than through pre-defined results;
- integrating strategic monitoring, self-evaluation and knowledge management together with stakeholders as central elements of process management and continuous improvement of performance.

LearningSystem is grounded on two theoretical foundations. The first is systems thinking and systemic intervention which is reflected in the LearningWheel©. The second foundation is action learning through iterative cycles of action and reflection in implementation. While the LearningWheel provides the systemic frame within which the intervention navigates (the map), the action learning is a navigation instrument which enables one to explore the system (the compass).

The major steps of the LearningSystem methodology are:
1. *Development of a vision of the outcomes in terms of the desired changes in behaviour of the main players* (ultimately it is the actors themselves who make the development process work and the outside intervention can only trigger changes in the behaviour within the system)
2. *Clarifying the strategy to create the behavioural changes and the products, which are required to influence, and achieving the desired outcomes* (e.g. new approaches, best practices, successful cases etc.)
3. *Development of conceptual frameworks (LearningWheels) for the main products / approaches including the main learning / research questions* for which one is looking for an answer
4. *Setting up a consistent process documentation, monitoring and learning system,* which allows a quality systematisation and conceptualisation of the lessons and insights together with stakeholders and to assess impacts and outcomes
5. *Organising the implementation through structures /teams following the functional, integration and capacity requirements* (rather than starting from institutional or political requirements)

It is evident that this process management system is a tool to manage complex, knowledge-based interventions and innovation processes among stakeholders. It is not designed to plan and manage linear, hardware projects (e.g. like road construction, logistics etc).

LearningSystem was applied in a range of development programmes and also in research projects. It was facilitated in a flexible and adaptive way in order to take account of the specific requirements of different situations and contexts. Its major impact has been that programmes integrated more conceptual thinking in the way they steered their interventions towards impact and the quality of learning process implementation has increased. An important contribution of LearningSystem methodology is a set of commonly agreed quality criteria for assessing process-oriented projects in terms of inputs and outputs.

Further information

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